

GHL Build Session — Part 2

Date: February 23, 2026 **Session Focus:** API key resolution, V1 migration, live foundation setup, ChatGPT workflow builder prompt

Session Summary

Deliverable	Status
Audit Gemini's API troubleshooting doc	Complete — diagnosis correct
Live API endpoint testing (V1 vs V2)	Complete — V1 confirmed working
Migrate all code to V1 API	Complete
Fix dropdown field bug in setup script	Fixed
Run setup script against live GHL account	20 fields + 6 values created ✓
ChatGPT Agent Mode workflow builder prompt	Built — all 7 workflows
Session PDF	This document

Part 1 — Gemini's Diagnosis Was Correct

Gemini identified that the JWT API key was being rejected with `{"statusCode":401,"message":"Invalid JWT"}` by the V2 API endpoint (`services.leadconnectorhq.com`).

Root cause: GHL has two API systems:

- **V1** (`rest.gohighlevel.com/v1`) — uses location-level JWT tokens, still fully functional
- **V2** (`services.leadconnectorhq.com`) — requires OAuth2 Private App tokens from Agency Settings

The key in `.env.local` is a valid V1 location token. Gemini correctly identified the issue and recommended either a V2 Private App setup or V1 fallback.

Decision: Use V1 now. All endpoints confirmed working. Upgrade to V2 when Thuy creates a Private App in Agency Settings (optional — V1 is not being deprecated in the short term).

Part 2 — Live API Testing Results

All endpoints tested against the live Soleil Pharmacy GHL account:

Endpoint	V2 Result	V1 Result
GET /locations/	401 Invalid JWT	200 ✓
GET /contacts/	401	200 ✓ (15,880 contacts found)
GET /pipelines/	401	200 ✓ (3 existing pipelines)
GET /custom-fields/	401	200 ✓ (30 existing fields)

GET /custom-values/	401	200 ✓
POST /custom-fields/	401	200 ✓
POST /custom-values/	401	200 ✓
POST /contacts/{id}/tags/	401	200 ✓
POST /contacts/{id}/workflow/{id}	401	200 ✓
POST /pipelines/{id}/opportunities/	401	200 ✓
PUT /pipelines/{id}/opportunities/{id}	401	200 ✓

Existing account data found:

- 15,880 contacts already in the system
 - 3 pipelines (PGx, Pharmacogenomics, TrichoTest — none are our Rx pipelines yet)
 - 30 existing custom fields (legacy fields from previous setup)
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Part 3 — Bugs Found & Fixed

Bug 1 — Wrong V2 base URL across all code

All three files (`ghl.ts`, `ghl-setup.js`, webhook routes) were targeting `services.leadconnectorhq.com` with the `Version: 2021-07-28` header.

Fix: Changed to `rest.gohighlevel.com/v1`, removed `Version` header.

Bug 2 — V1 opportunity endpoint is pipeline-scoped

V2 has a flat `/opportunities/` endpoint. V1 scopes opportunities under `/pipelines/{pipelineId}/opportunities/`.

Fix: Updated `createOpportunity` to use pipeline-scoped path. Added new `getOpportunityByContact(pipelineId, contactId)` function to find a contact's opportunity within a specific pipeline.

Bug 3 — V1 opportunity update requires `title + status` in body

V2's PUT only needs the fields you're changing. V1's PUT body requires `title` and `status` even when only updating the stage.

Fix: Updated `updateOpportunityStage` signature to accept `currentTitle` and `currentStatus`. The webhook routes call `getOpportunityByContact` first to retrieve these values before calling the update.

Bug 4 — V1 custom field/value creation: no `locationId` in body

V2 required `locationId` in the POST body. V1 scopes the location from the bearer token.

Fix: Removed `locationId` from all custom field/value POST bodies.

Bug 5 — Dropdown fields used wrong property key

V1 custom field API uses `options` for picklist values. The setup script was sending `picklistOptions` (V2 format), causing 422 errors on 5 dropdown fields.

Fix: Changed `picklistOptions` → `options` in setup script.

Part 4 — What Was Created in Live GHL

`node scripts/ghl-setup.js` ran successfully against the live Soleil Pharmacy account.

Custom Fields Created (20 total)

Provider Fields (5):

Field Name	GHL Key
NPI Number	<code>contact.npi_number</code>
Clinic Name	<code>contact.clinic_name</code>
Preferred Communication	<code>contact.preferred_communication</code>
Portal Activation Date	<code>contact.portal_activation_date</code>
Contract Signed Date	<code>contact.contract_signed_date</code>

Patient Fields (15):

Field Name	GHL Key
Pioneer Rx #	<code>contact.pioneer_rx_</code>
Formula ID	<code>contact.formula_id</code>
Prescriber Name	<code>contact.prescriber_name</code>
Prescriber NPI	<code>contact.prescriber_npi</code>
Days Supply	<code>contact.days_supply</code>
Rx Expiration Date	<code>contact.rx_expiration_date</code>
Refill Count Remaining	<code>contact.refill_count_remaining</code>
Compound Type	<code>contact.compound_type</code>
Consent Signed Date	<code>contact.consent_signed_date</code>
Payment Date	<code>contact.payment_date</code>
Shipped Date	<code>contact.shipped_date</code>
Tracking Number	<code>contact.tracking_number</code>
Shipment Carrier	<code>contact.shipment_carrier</code>
Preferred Language	<code>contact.preferred_language</code>

Auto-Refill Enrolled	contact.autorefill_enrolled
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Custom Values Created (6 total)

Name	GHL Template Variable
Secure Payment Link	<code>{{custom_values.secure_payment_link}}</code>
Pharmacy Address	<code>{{custom_values.pharmacy_address}}</code>
Pharmacy Phone	<code>{{custom_values.pharmacy_phone}}</code>
Pharmacy Hours	<code>{{custom_values.pharmacy_hours}}</code>
Portal Guide URL	<code>{{custom_values.portal_guide_url}}</code>
Calendly Link	<code>{{custom_values.calendly_link}}</code>

Action required: Go to GHL Settings → Custom Values and populate each one with the real URL/content.

Part 5 — Code Files Updated

src/lib/ghl.ts

Complete V1 rewrite. Key changes:

- Base URL: `https://rest.gohighlevel.com/v1`
- Removed Version header
- `createOpportunity` : now uses `/pipelines/{id}/opportunities/` path with V1 field names (`stageId` not `pipelineStageId`)
- New function: `getOpportunityByContact(pipelineId, contactId)` — finds opportunity by contact within a pipeline
- `updateOpportunityStage` : new signature `(pipelineId, opportunityId, stageId, currentTitle, currentStatus)`
- `createCustomField` : removed `locationId` + `model` from body, uses `options` for picklist
- `createCustomValue` : removed `locationId` from body
- TypeScript check: 0 errors ✓

src/app/api/webhooks/pioneer/route.ts

Updated to use new `getOpportunityByContact` + new `updateOpportunityStage` signature.

src/app/api/webhooks/payment/route.ts

Updated to use new `getOpportunityByContact` + new `updateOpportunityStage` signature.

scripts/ghl-setup.js

Updated to V1 endpoints. Added pre-flight check against existing fields/values (idempotent). Fixed `picklistOptions` → `options`. Script is fully functional and confirmed working.

Part 6 — ChatGPT Agent Mode Prompt

docs/ChatGPT_GHL_Workflow_Builder_Prompt.md + .pdf

Contains:

- **Master Context Block** — paste once at the start of the ChatGPT session
- **Step 0** — creates both pipelines
- **Workflow 1** — B2B Lead Nurture & Onboarding (10 nodes)
- **Workflow 2** — Rx Intake & Pharmacist Alert (8 nodes)
- **Workflow 3** — Patient Payment & Consent Chase (15 nodes) ← build first
- **Workflow 4A** — Compounding Started notification
- **Workflow 4B** — Order Shipped notification
- **Workflow 4C** — Ready for Pickup notification
- **Workflow 5** — Refill Reminder Dynamic (9 nodes)
- **Workflow 6** — Legacy Fax Exception (7 nodes)
- **Workflow 7** — Provider Portal Onboarding (9 nodes)
- **Final Verification Checklist**

How to use: Open ChatGPT agent mode → logged into GHL → paste Master Context → paste one workflow at a time → verify before next.

Part 7 — Complete Project Status

Done (via API — live in GHL now)

- 20 custom fields created
- 6 custom values created (need to be populated with real content)
- Webhook receiver: Pioneer Rx → GHL (/api/webhooks/pioneer)
- Webhook receiver: Payment confirmation → GHL (/api/webhooks/payment)

In Progress (needs ChatGPT agent or manual GHL UI)

- Create 2 pipelines (Step 0 in ChatGPT prompt — 10 min)
- Build 7 workflows in GHL Automation UI

Still Required in GHL UI

- HIPAA mode ON + BAA signed
- Populate 6 Custom Values with real URLs
- 10DLC SMS registration
- Set PIONEER_WEBHOOK_SECRET in .env.local
- Set STRIPE_WEBHOOK_SECRET in .env.local

For V2 Upgrade (Optional — future)

- Go to GHL Agency Settings → App Marketplace → Create Private App
 - Scope permissions: contacts, opportunities, customFields, customValues, workflows
 - Replace GHL_API_KEY in .env.local with the new token
 - Update BASE_URL in src/lib/ghl.ts to https://services.leadconnectorhq.com
 - Add Version: 2021-07-28 back to headers
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Documents in This Project

File	Description
docs/GHL_Automation_Blueprint_v2.pdf	Full automation blueprint — 7 workflows, AI prompts
docs/GHL_Foundation_Setup_Guide.pdf	Click-by-click GHL UI setup
docs/GHL_Build_Session_Feb23.pdf	Session 1 recap
docs/GHL_Build_Session_Feb23_Part2.pdf	This document
docs/ChatGPT_GHL_Workflow_Builder_Prompt.pdf	Prompt for ChatGPT agent to build all 7 workflows

Code Structure

```
soleil-infusion/
├── src/
│   ├── lib/
│   │   └── ghl.ts           ← GHL V1 API client
│   └── app/
│       └── api/
│           └── webhooks/
│               ├── pioneer/route.ts  ← Pioneer Rx intake
│               └── payment/route.ts  ← Stripe payment confirmation
└── scripts/
    └── ghl-setup.js          ← Run once – creates fields/values
└── .env.local                ← API credentials
```